

MARKETING WORKSHEET

Date Completed: _____

Your Name:	Company Name:
Years in business:	Telephone:
E-mail:	Website:
Address:	

Business Description/ Benefits Statement. Short and sweet; what do you offer to your clients?	
Annual Marketing Budget; figure 5% of gross sales	<i>Include graphics, printing; advertising; photography, direct mail, promotions, trade shows, etc.</i>
Describe Your Primary Target Market as <u>specifically</u> as possible	
Describe your secondary target market	
Geographic Target Area	
Goals for this year, quantifiable <i>e.g. increase sales by 10%, increase customer base by X%, increase sales pitch opportunities by X number each week, etc.</i>	<ol style="list-style-type: none"> 1. 2. 3. 4. 5.

<p>Roadblocks to Success</p> <p><i>weaknesses, competition, outside factors such as trends, problem you are trying to solve, etc.</i></p>	
<p>Opportunities for Success</p> <p><i>new products, company strengths, outside factors such as trends; seasonal trends, etc.</i></p>	
<p>Three biggest competitors; what advantage do you think they have?</p>	
<p>Top 3 most successful clients; and why they were successful</p>	
<p>Marketing events and/or activities you have already planned for the next 6-12 months</p>	
<p>Marketing vehicles you have used with success</p>	
<p>Marketing vehicles you have used without success</p>	
<p>Social Media Tools; indicate Twitter Handle & FB page</p>	

If you would like feedback, please email this form to: Risa Hoag, President, 845-627-3000

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